



Patient-Centered Outcomes Research Institute

REQUEST FOR PROPOSAL

RFP # PCO- SCISRV2013

Scientific Survey Services

February 21, 2013

KEY DATES	
ACTION	DATE
RFP Released	February 21, 2013
Deadline for RFP Questions	March 4, 2013
Deadline for Proposals	March 25, 2013
Projected Award Date	April 5, 2013
Projected Start Date	April 12, 2013

Opportunity Snapshot

The Patient-Centered Outcomes Research Institute (PCORI) was created to conduct research to provide information about the best available evidence to help patients, those who care for them, payers, policy makers, and others make better informed decisions. PCORI's research is intended to give patients and their caregivers a better understanding of the prevention, treatment, and care options available and the science that supports those options.

Purpose

PCORI is seeking proposals from experienced Contractors to conduct scientific surveys of patients, to include those with rare diseases as well those with chronic diseases, and PCORI is also soliciting proposals to conduct scientific surveys of health providers, to include primary care providers and specialty care providers. Survey services requested include survey development; sample recruitment strategies; data collection plans; and plans for data management, data analysis, and reporting of results. The Contractor should have extensive experience with all types of the survey services listed.

PCORI works to encourage engagement in research by patients and other stakeholders, in all phases of patient-centered outcomes research (PCOR), including topic generation, research prioritization, study design, sample recruitment, project implementation, analysis, and dissemination of results. PCORI supports research on methods to understand optimal approaches for identifying and addressing PCOR questions and optimal approaches to engagement of patients and other stakeholders in research. PCORI is committed to collaborating with patients, other stakeholders, and subject matter experts in PCOR to advance the PCORI research agenda. Collection of information from patients and clinicians via surveys is one way PCORI advances the research agenda. Respondents can submit proposals for one or both of the target groups (patients or clinicians), based on the capabilities the firm offers. Contractors may also choose to submit proposals to focus work on one of the subsets of target groups (chronic disease patients or rare disease patients; primary care providers or specialty care providers). Reason for excluding one or more of the target groups of interest from the proposed scope of work must be specified. It is expected that the Contractor shall provide a Technical Proposal and a supporting Cost Proposal that supports the estimated requirements detailed below.

Expertise in health, health care, or health policy sectors preferred.

Funds Available, Budget, and Project Periods

It is expected that the contract will be a hybrid: Firm Fixed Price (FFP) for those expenses that are proposed, directly related to the performance of the contract, and preapproved by PCORI, and Cost Reimbursable for the remainder of approved project costs. Please refer to the Cost Proposal section in Step 3 below for additional details.

Project funding decisions will be based on the technical approach of the proposal, understanding of PCORI's mission and the ways in which the proposed work supports that mission, and on proposed costs.

Responding organizations must provide:

- All expected expenditures and fees in their final bid.
- A pricing proposal that supports the entire Scope of Work outlined in the request for proposal (RFP) and that lists key services with corresponding price quotes that are valid for at least one year from the project start date.

The performance period of this contract commences with the start date established in the Notice to Proceed and continues for 12 months.

Organizational Eligibility

Proposals may be submitted by any private sector organization, including non-profit and for-profit organizations. The Internal Revenue Service must recognize all US organizations.

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Scientific Survey Services

If you are interested in submitting a proposal, follow PCORI's five-step process.

Overview—PCORI Five-Step Process



1. Review the Program Detail

Examine all sections of the RFP and what makes PCORI's research different (<http://www.pcori.org/research-we-support/>).

2. Consider the Requirements

Consider the organization eligibility requirements and PCORI's specific requirements to see if your organization, your interests, and your capabilities fit this program.

3. Develop Your Solution

Design your response to accomplish the Scope of Work, satisfy the expected deliverables on time, and provide services that demonstrate cost efficiency and ingenuity. Be sure to include a cost proposal that is clear and concise, along with justification for all direct and indirect costs.

4. Know the Review Criteria

Understand PCORI's evaluation factors and how they are weighted. Details are provided in this RFP.

5. Submit Your Proposal

Compile and submit your proposal. All proposals must be submitted no later than 5 p.m. (Eastern Time) on March 25, 2013.

Step 1: Review the Program Detail



Scope of Work

The Contractor shall provide scientific survey services for the Engagement Research Director.

The main research objectives of the scientific survey services are as follows:

- To understand patient and healthcare provider attitudes toward and perceptions of comparative effectiveness research (CER).
- To understand patient and healthcare provider understanding of and attitudes toward patient and other stakeholder engagement in research.
- To evaluate the potential for patient and healthcare provider engagement in research to enhance the uptake of research results in clinical practice.
- To understand barriers to and facilitators of use of CER results in health decision making and clinical practice.
- To develop methods to facilitate use of CER in health decision making and clinical practice.
- To document the current state of knowledge for each of the five areas above, through literature review.
- To evaluate the impact of PCORI's programs and scientific initiatives over time.

Contractor Requirements for Providing Scientific Survey Services

The scope of work in the proposal should address one or both of the following two research tracks:

- Track 1: Patient survey
- Track 2: Healthcare provider survey

For each track, the Contractor will:

- Conduct a literature search to identify relevant existing survey instruments or items.
- Develop a protocol for sample selection and recruitment.
- Develop, pre-test, and field the survey.

- Manage and analyze the survey data.
- Report the results.

Use of Stakeholder Partners in this Scope of Work

PCORI supports the use of stakeholder partners in the design, conduct, and dissemination of survey research. Stakeholder partners could include patients with a chronic or rare disease, patient advocates, caregivers, healthcare providers, researchers, policy makers, payers, purchasers, and other non-patient stakeholders. The Contractor should describe in detail how stakeholder input will be incorporated.

Literature Review and Summary

The Contractor will perform a scan of the current literature (both peer-reviewed and grey literature) to identify relevant existing survey instruments or items that may be used or adapted for the current purpose, as well as to identify relevant qualitative research that would inform the development of new survey items. The Contractor will provide a written summary of the findings from the literature scan. Summary of the literature is expected to be at least 10 pages in length; tables may supplement text to describe results.

Sample Selection

Track 1: Patients

The Contractor will develop a sample selection protocol for recruitment of a sample of patients with chronic conditions and patients with rare diseases. The sample size for patients with chronic conditions and with rare diseases should be sufficient for meaningful sub-group analyses. PCORI anticipates recruiting approximately twice as many chronic disease patients as rare disease patients, but Contractor may suggest sampling strategies and sample sizes based on specific work plan proposed. The protocol should address appropriate sampling frame and sample size, describe inclusion/exclusion criteria and screening processes, and provide evidence of recruitment success from prior work. The sample selection protocol should include sampling and recruitment for English-speaking and US Spanish-speaking patients. Demonstration of ability to recruit special populations (e.g., racial/ethnic minorities, persons with rare diseases) is desirable. Desired minimum sample size per survey is 500 patients per patient type (chronic disease, rare disease).

Track 2: Healthcare Providers

The Contractor will develop a sample selection protocol for efficient and comprehensive recruitment of a variety of healthcare providers, including primary care providers (e.g., physicians, nurse practitioners, physician assistants) and specialty care providers who practice in a variety of settings (e.g., community-based practice, hospital-based practice). The protocol should address appropriate sampling frame and sample size, describe inclusion/exclusion criteria and screening

processes, and provide evidence of recruitment success from prior work. Desired minimum sample size per survey is 500 providers per provider type (primary care, specialty care).

Survey Instruments

Two broad types of surveys are requested: patient surveys and healthcare provider surveys. For patients, different items may be appropriate by patient type: chronic disease patient and rare disease patient. For providers, different items may be appropriate by provider type.

The Contractor will work closely with PCORI staff to draft a survey instrument based on the findings from the literature review and input from patients and other stakeholders engaged in the conduct of this scope of work, along with Methodology Committee and other external experts advising on this work. The Contractor may also have access to preliminary findings from previous survey work conducted by PCORI (including patient, caregiver, and provider survey results and evaluations from patient and stakeholder workshops) to inform the development of the survey. For research objectives for which no validated survey items exist, the Contractor will work with PCORI staff to develop new survey questions according to established scientific methods for minimizing measurement error and maximizing validity and reliability. The Contractor should provide recommendations about the optimal survey length and recommendations for socio-demographics and classification variables (e.g., disease characteristics, clinical practice characteristics). The Contractor will provide a draft survey instrument and a related summary describing the rationale for inclusion/exclusion of existing survey items, original source of items and any modifications, and rationale for development of new items. PCORI anticipates that individual surveys will have between 15 and 30 total items.

The Contractor should describe the methods used to ensure that the survey reading level is appropriate for the target population. The proposal should also detail the process for translation of the patient survey into US Spanish. The Contractor should recommend the mode(s) of data collection (e.g., mailed survey, telephone survey) appropriate for the target population. Demonstration of the feasibility of data collection mode is expected, through pre-testing and/or through evidence of Contractor's successful use of the data collection mode.

The Contractor will conduct cognitive pre-testing of the draft survey and work with PCORI to review the question wording, order, clarity, and overall survey instrument quality in order to maximize response rates, reliability, and validity. The Contractor will provide a final survey instrument along with a summary of item source, item development process, and pre-testing results, with clear explanation of revisions made and rationale for all revisions.

Survey Administration and Data Quality Control

Human subjects approval should be obtained by the Contractor. The Contractor will field the survey using the agreed upon sampling protocol, survey instrument, and mode(s) of data collection. The Contractor will provide a strategy for calculating and monitoring response rates. The Contractor is responsible for data quality monitoring and control.

Standards for data quality should be specified in advance and plans created if needed to ensure data meet pre-specified quality standards.

Data Management and Analysis Plan

The Contractor will be responsible for creating, maintaining, and providing a cleaned and fully labeled data set. The Contractor will create and execute an analysis plan to include comparison of respondents and non-respondents, methods for management of missing data, recommended subset analyses, methods for testing the main research objectives, and recommended format for presentation of results to research audiences and to general audiences.

Project Management

The Contractor shall provide the staff and equipment necessary to assure that the highest quality of service is provided. The Contractor shall have the capability to deliver the desired results to PCORI as required. All Contractor personnel providing services under this contract shall be fluent in English and meet the following requirements. All key personnel shall be available to start on the contract start date.

Step 2: Consider the Requirements



Overview—Requirements for Providing Scientific Survey Services

The Contractor will directly manage the project, interface with key PCORI program staff members, ensure adherence to the approved budget, meet established deadlines, ensure quality control, and conclude each event with a series of recommendations for process improvement.

Program Management

The Contractor shall provide the strategic guidance, project management, personnel, equipment, technology, and design necessary to assure that the highest quality service is provided on schedule and within budget. The Contractor shall have the capability to provide a full-scale solution as described in this RFP and delivered within the time frame required. All Contractor personnel providing services under this contract shall be fluent in English and meet the following requirements. All key personnel shall be available to start on the contract start date.

Key Personnel

Senior Project Manager

The Contractor shall provide a Senior Project Manager (PM) who shall be responsible as the point of contact (POC) for PCORI. The PM shall have experience in the management of the scientific survey services and shall have adequate authority to make decisions for the timely resolution of problems. The PM shall coordinate closely and work collaboratively with the Engagement Research team. The qualifications of the PM include extensive experience with the types of the survey services listed and deep understanding of best practices for developing and conducting surveys. The PM shall possess outstanding communication abilities and will be the single point of contact for PCORI for any and all questions, issues, and collaboration. This individual is also responsible for delivering the timely reports as described in the Deliverables section of this RFP.

Survey Researcher

The Contractor shall provide a Survey Researcher who shall direct the literature search, survey development, sample design and recruitment, data collection, and reporting of results.

Data Analyst

The Contractor shall provide a Data Analyst (DA) who shall direct the data management and data analysis. The DA shall have proven experience in data management and analysis of scientific survey data. The Contractor shall also have access to all needed support to allow the timely and on-budget development/provision of scientific surveys.

Other Staff/Subcontractors

The Contractor shall propose how it will staff the Scientific Survey Services contract to support PCORI's needs to include all services described in this scope of work. PCORI anticipates a staff of four, including the Project Manager, but will accept reasonable and justifiable labor mixes and hours outside of the suggested categories. The Contractor shall demonstrate its ability to support the variety of requests from PCORI and present its problem resolution method. The Contractor shall communicate all terms and conditions of the contract to any and all subcontractors.

Deliverables

The Contractor shall provide the following deliverables/submittals within the time frames identified below:

Deliverable	Items	Due Date
Regular Progress Reports	Biweekly updates during project performance period, via teleconference	All deliverables should be provided electronically to the Director of Engagement Research
Plan for Obtaining Patient and Other Stakeholder Input Initiated	Submit documents to PCORI electronically	Four weeks after award date
Literature Scan Summary	Submit documents to PCORI electronically	Four weeks after award date
Sample Selection and Recruitment Protocol	Submit documents to PCORI electronically	One week after Literature Scan Summary
Draft Survey Instrument	Submit documents to PCORI electronically	Four weeks after Literature Scan Summary
Pre-testing Summary	Submit documents to PCORI electronically	Four weeks after Draft Survey Instrument
Final Survey Instrument	Submit documents to PCORI electronically	Two weeks after Pre-testing Summary
Data Analysis Plan	Submit documents to PCORI electronically	Two weeks after Pre-testing Summary
Human Subjects	Submit documents to PCORI	Two weeks after Final

Approval	electronically	Survey Instrument
Final Deliverables	PowerPoint Presentation and two brief summary reports	12/31/13
Ad Hoc	Send to Director of Engagement Research	PCORI may request special reports to be developed over the course of the contract

Management Reports and Deliverables

The Contractor shall provide PCORI with management information reports. At a minimum, the Contractor shall develop the following reports at the conclusion of the contract.

Quarterly Problem and Resolutions Report—A concise quarterly narrative (no more than one page) of the Contractor’s activities. This report shall identify problems and recommend solutions. The report shall include suggestions to enhance service, where appropriate. PCORI encourages interim reports, as deemed necessary by the Contractor.

Final PowerPoint Presentation and Summary Reports—A PowerPoint presentation summarizing the survey methodology (including survey development, sampling and recruitment, and statistical analysis) and the key findings of the survey. The presentation should use easily understood terms, tables, and figures, while maintaining scientific rigor and technical detail.

Scientific Survey Reports—Two brief reports summarizing the survey methodology and the survey findings: one report should be a technical report with sufficient detail and appropriate language for inclusion in a manuscript for submission to a peer-reviewed journal, and the other report should summarize the same material briefly, using terms, tables, and figures that can be readily understood by a non-technical audience.

Ad Hoc Reporting - PCORI anticipates completion of substantial additional analysis from the surveys beyond that to be specified in the Contractor's initial analysis plan. As such, the Contractor should include plans and pricing for ad hoc analysis and reporting support, to meet the information needs of multiple teams within PCORI, and to answer questions generated through review of the first set of analyses. Please see the Step 3 for further information.

Place of Performance

The Contractor is required to provide its own facility for the services required hereunder. This function shall be staffed by the Contractor’s personnel and located at its offices.

Hours of Service

It is expected that the Contractor will be available for project support, Monday through Friday, between 8:30 a.m. and 5:30 p.m. (Eastern Time). PCORI has regular observance of

federal holidays: New Year's Day; Martin Luther King Day; Memorial Day; Independence Day; Labor Day; Thanksgiving Day; day after Thanksgiving; and Christmas Day.

Type of Contract

It is expected that the contract executed will be a hybrid: FFP for the PM category and Cost Reimbursable for the remaining items in the proposed budget. Please refer to the Cost Proposal section of Step 3 of this RFP for additional details. Specific terms and conditions will be provided to the winning Offeror and follow PCORI's standard contracting format. All Contractors are required to execute Non-Disclosure Agreements (NDAs) and Conflict of Interest (COI) forms prior to final contract execution.

Insurance

The Contractor, at its own expense, shall provide and maintain at least \$1 million of general liability insurance during the entire period of performance of this contract.

Contractor's Quality Control and Quality Assurance Surveillance Plan

The Contractor shall describe its procedures to monitor the quality of the provided services relative to the scope described herein, with the goal of providing and maintaining the highest level of customer service and satisfaction. These procedures should include:

- An internal method for monitoring, identifying, and correcting deficiencies in the quality of service furnished to PCORI.
- Providing at least weekly management reports to PCORI, throughout the duration of the contract.

Service Level Agreements

It is PCORI's intent to develop Service Level Agreements (SLAs) for this effort to ensure that the quality and integrity of information is maintained and produced. The SLAs will be developed post award, if it is mutually agreed between the Offeror and PCORI to be a form of measurement of the success of the program by the Offeror. The SLAs, after being established, may be subject to change as the program progresses and matures.

Quality Assurance Surveillance Plan

As a performance-based contract, the Contractor will be required to perform at an acceptable level of quality, at the minimum, to continue supporting the contract. Should the Contractor be unable to meet the requirements, the contract may be canceled due to unsatisfactory performance. The following quality guidelines will be used to measure Contractor performance. These guidelines are subject to change, if it is in the best interest of PCORI.

Compliance

Contractor is to comply with PCORI's rules and regulations (to be provided to awarded Contractor), all required forms, and any changes in procedures. Contractor will remain informed of any such changes and updates, as necessary, by the PCORI Procurement Office.

Upon the request of employees or other persons with disabilities participating in official business, the Contractor must arrange necessary and reasonable accommodations for the impaired individuals per Section 508 Compliance.

Period of Performance

The expected period of performance is for 12 months, from 4/12/2013 until 4/11/2014.

Non-Disclosure Agreements

The Contractor shall not release any sensitive, confidential, or proprietary information, without prior written approval from PCORI. At the time of award, the Contractor will be required to sign an NDA.

Organizational Conflict of Interest

The Contractor, upon award, shall sign a statement confirming that it does not have and will prevent any organizational conflict of interest. If a conflict arises, the Contractor will immediately advise PCORI.

Step 3: Develop Your Solution

3 Overview—Proposal Content

Your proposal should be organized into two separate volumes: Volume I to include the Technical Solution, Management Approach, and Past Performance and Volume II to include the Cost Proposal.

The Technical Solution, Management Approach, and Past Performance volume should be addressed in the first section of the proposal. Additional detail (for example, project team bios) may be included in the appendix (exclusive of the title page and table of contents) and sent via the acceptable formats noted in Step 5 of this RFP; however, PCORI is not obligated to review additional information contained outside of the page count, nor should Contractors use any appendices as a way to respond to any section of the proposal.

Technical Solution

The Offeror shall demonstrate and describe its proposed solution, based on the requirements in the Statement of Work. Proposals should include the information outlined in this section; our ability to interpret and apply your proposal to these questions will factor into our decisions. The submission shall be no longer than fifteen (15) pages.

1. Describe in detail the firm's proposal to address the requirements outlined in this RFP; explain the process you will follow to:
 - a) Develop and implement a survey with the goal of increasing understanding of patient and/or healthcare provider perceptions of comparative effectiveness research.
 - b) Develop a protocol for sample selection and recruitment.
 - c) Develop, pre-test, and field the survey.
 - d) Analyze and report on survey results.
2. Provide a time line for the completion of this proposal; provide a brief history and profile of the firm and its experience providing services for organizations similar to ours (i.e., other non-profits, funding organizations, research institutes, or think tanks); and provide a list of the firm's clients comparable to our organization (include contact name, telephone number, website location, services provided, and length of service).
3. Describe the project process and methodology, including sample deliverables from past projects of similar size and scope. Document examples of the firm's experience in survey research as applicable to each of the project requirements.

Management Approach

The Offeror shall demonstrate the ability to effectively manage and control the operation through completion of products/deliverables by demonstrating successful program support. The Offeror shall provide information about program management, financial resources or ability to obtain them, equipment and facilities, quality assurance approach, internal controls, and staffing.

- Key personnel resumes should be no longer than two pages and are not included in the page count.
- List the project team and short biographies of each team member. If using freelancers or subcontractors, please indicate them as such; we reserve the right to approve/disapprove of selected resources. Indicate how many full-time staff members your firm employs.
- The qualifications of the Project Manager include the proven ability to provide scientific survey services, including conducting literature searches, developing sampling and recruitment protocols, generating and pre-testing survey items, and conducting surveys and analyzing the results. The Project Manager shall possess outstanding communication abilities and will be the single point of contact for PCORI for any and all questions, issues, and collaboration. This individual is also responsible for delivering the timely reports as described in the Deliverables section of this RFP.
- If the proposal is for completing survey research in less than all four target populations (chronic disease patients, rare disease patients, primary care providers, specialty care providers), then Contractor must agree to coordinate with other vendor(s) completing the complementary survey services.

Past Performance

The Offeror shall also identify up to three (3) previous or existing clients within the last five (5) years with a similar effort in the appropriate commercial or federal market. Include client name, period (dates) of performance, the point of contact name/e-mail/phone number, and a synopsis of work performed.

Provide a brief history and profile of the firm and its experience providing similar services for other public, private, or non-profit entities. Provide three (3) of the firm's clients comparable to our organization; include contact name, telephone number, website location, services provided, and length of service.

Describe the project process and methodology, including sample deliverables from past projects of similar size and scope. Document examples of the firm's experience in each of the project requirements.

Cost Proposal

A Cost Proposal should be distinct and separate from the aforementioned narrative. PCORI expects to make one award or multiple awards. Costs shall be supported by a cost justification description that allows a sufficient amount of detail to include G&A (general

and administrative), Overhead, Fringe, and Fee (where applicable) rates. Information should include the rates for each labor category and should spell out the Direct Labor (DL) rates and the Total Billable rate by labor category, showing how each rate is applied to the DL. Although project funding decisions will be based on the technical approach of the proposal, responding organizations must include all expected expenditures and fees in their final bid.

PCORI anticipates completion of substantial additional analysis from the surveys beyond that to be specified in the Contractor's initial analysis plan. As such, the Contractor should include plans and pricing for ad hoc analysis and reporting support, to meet the information needs of multiple teams within PCORI, and to answer questions generated through review of the first set of analyses. Pricing should be included in the Contractor's offer, as shown below. The Contractor should propose the hours, labor rates and total pricing for this optional labor. Labor for this category will be exercised at the discretion of PCORI.

Organizations must provide a pricing proposal that supports the entire Scope of Work outlined in the RFP and that lists key personnel and key services with corresponding price quotes that are valid for at least one year from the project start date. If needed, a brief budget narrative (no more than two pages) may be included to clarify unusual budget items or calculations. The Cost Proposal does not count toward the page count limitation. Nevertheless, this section should also conform to PCORI's formatting requirements, as noted in this RFP.

Labor Categories	Type	Quantity	Hours	Unit Price	Pricing
Project Manager (Key)	FFP	1	400		
Survey Researcher (Key)	CR	1	Propose		
Data Analyst (Key)	CR	1	Propose		
Administrative Assistant	CR	1	Propose		
Data Analyst (Optional) for Ad Hoc Analysis	CR	Propose	Propose		

Step 4: Know the Review Criteria

4 Overview—Review Criteria

An award will be made to the Offeror(s) who propose(s) the best value, with the technical solution being more important than the management approach, past performance, and price, as determined by the Scope of Work outlined in the previous sections, and the following evaluation factors, as indicated in the matrix below.

PCORI reserves the right to reject proposals that are unreasonably low or high in price. Price will be evaluated for cost realism. The price will be determined with regard to the fulfillment of the requirements based on Step 1. PCORI will determine the Offeror's acceptability by assessing the Offeror's compliance with the terms of the RFP.

Matrix

Transaction Description	Weight of Rating Factor
Technical Proposal	45%
Past Performance	25%
Management Approach	20%
Cost Proposal	10%

Evaluation Categories

Outstanding—The Offeror has demonstrated that there is a high probability of success in a combination of past results, low risk, and professional distribution of services.

Good—The Offeror has demonstrated that there is a good probability of success in a combination of past results, moderate risk, and professional distribution of services.

Fair—The Offeror has demonstrated that there is marginal probability of success in a combination of past results, marginal risk, and professional distribution of services.

Poor—The Offeror has not demonstrated that there is a probability of success in this services-based effort.

Best and Final Offers

Subsequent to receiving original proposals, PCORI reserves the right to notify all technically acceptable Offerors within the competitive range and to provide them an opportunity to submit written Best and Final Offers (BAFOs) at the designated date and time. BAFOs will be evaluated and considered at PCORI's discretion. After receipt of a BAFO, no discussions will be reopened unless PCORI determines that it is clearly in PCORI's best interest to do so (e.g., it is clear that information available at that time is inadequate to reasonably justify Contractor selection and award based on the BAFOs received). If discussions are reopened, PCORI will issue an additional request for BAFOs to all technically acceptable Offerors still within the competitive range.

At its discretion, PCORI reserves the right to also invite Offerors who are technically acceptable to conduct a presentation to PCORI on the proposed effort for technical and management approaches identified in the submission. PCORI will notify vendors who meet the qualifications and provide the date, time, and format for the presentation. PCORI expects to fund one proposal. However, PCORI reserves the right to fund more than one proposal or to fund no proposal if, in its judgment, an acceptable proposal is not identified.

Step 5: Submit Your Proposal



Overview—Summary of Instructions

Each proposal submitted must conform to the following instructions.

Format

All text should be Arial or Times New Roman font, no less than 11 points with one-inch margins and single spaced. Graphics and tables are acceptable and encouraged; MS Word, MS Excel, or Adobe PDF formats. Proposals exceeding the page limit (exclusive of the title page and table of contents) will not be considered.

The submitted proposal must explain in detail the approach that the designated team would take to complete this work. For each team member, include a resume that is no longer than two pages (not included in the total page count). This could include, but is not limited to, an outline of the protocol development for sample selection and recruitment; methodology for the literature search, as well as how to interpret and understand patient and healthcare provider perceptions of comparative effectiveness research; the proposed work plan including major project milestones time line and fee structure; firm profile and history; proposed plans to subcontract operational and support services for completion of work, as well as the specific tasks to be assigned exclusively to each team member.

Cover Letter

The cover letter must contain the following information:

- Offeror's name and mailing address
- Reference to the solicitation (RFP) number (PCO-SCISRV2013)
- Technical and contract points of contact—name, phone number, and e-mail address
- Business size (Large, Small, State/Federal Certifications—MBE, 8(a), HUBZone, etc.)
- Dunn & Bradstreet Number (DUNS)
- Federal Tax ID (EIN, TIN, SS)
- Affirmation that the quote (cost proposal) is valid for at least 60 days
- A statement specifying the extent of agreement with all terms, conditions, and provisions included in the solicitation and agreement to furnish any or all items upon which prices are offered at the price set opposite each item
- Acknowledgement of any amendments by reference

Proposal

Ensure that your proposal contains the requisite two volumes (please refer to Step 3, which describes Volume I to include Technical Solution, Management Approach, and Past

Performance and Volume II to include Cost Proposal), conforms to the format and content instructions, and addresses the Scope of Work and all deliverables.

Submission Deadlines

- Questions should be addressed and submitted to rfp@pcori.org, referencing the RFP number in the subject line, NO LATER THAN 5 p.m. (Eastern Time) 3/4/13.
- Closing date—All proposals should be sent NO LATER THAN 5 p.m. (Eastern Time) 3/25/13, to rfp@pcori.org with the RFP number clearly listed in the subject line.
- Anticipated notice of award date is April 5, 2013.

Late Submissions

Late proposals, requests for modification, or requests for withdrawal will not be considered, unless a late modification of a successful proposal makes terms more favorable for PCORI.

Retention of Proposals

All proposal documents will be the property of PCORI and retained by PCORI, and, therefore, will not be returned to the Offerors.

Withdrawal or Modification of Proposals

An Offeror may modify or withdraw its proposal upon written, electronic, or facsimile notice if received at the location designated in the solicitation for submission of proposals, but not later than the closing date and time for receipt of proposals.

About PCORI

The Patient-Centered Outcomes Research Institute (PCORI) is an independent organization created to help people make informed healthcare decisions and improve healthcare delivery. PCORI will commission research that is guided by patients, caregivers, and the broader healthcare community and will produce high-integrity, evidence-based information.

PCORI is committed to transparency and a rigorous stakeholder-driven process that emphasizes patient engagement. PCORI will use a variety of forums and public comment periods to obtain public input throughout its work.

Our Mission

PCORI helps people make informed healthcare decisions and improves healthcare delivery and outcomes by producing and promoting high-integrity, evidence-based information that comes from research guided by patients, caregivers, and the broader healthcare community.

Our History

PCORI was created by the Patient Protection and Affordable Care Act of 2010 as a non-profit, non-governmental organization. PCORI's purpose, as defined by the law, is to help patients, clinicians, purchasers, and policy makers make better informed health decisions by "advancing the quality and relevance of evidence about how to prevent, diagnose, treat, monitor, and manage diseases, disorders, and other health conditions."

The statutory language defining PCORI is broad and authorizes research that will support a strong patient-centered orientation, inform better choices among alternative treatment and prevention strategies, and direct attention to individual and system differences that may influence strategies and outcomes. PCORI was designed to produce knowledge through the analysis and synthesis of existing research or the support of new research.